BOTTLED WATER

Market Opportunities in the
Asia Pacific Region for the
British Columbia Bottled Water Industry

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ASIA PACIFIC

Government of British Columbia
Ministry of Economic Development,
Small Business and Trade

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Purpose of the Report

The purpose of this report is to analyze the market potential of British Columbia bottled water in the Asia-Pacific region. The report includes overviews and analyses of market structures and trends in Japan, Hong Kong, South Korea, Singapore and Taiwan. In addition to current market intelligence, the report includes information on importers, brokers, trade associations and government organizations of use to the British Columbia exporter. The report also contains an appendix of shipping information and references for further market research.

The British Columbia Industry

At present there are 16 bottled water companies in British Columbia. Clearly Canadian is the largest company, with annual sales over $10 million. There are two companies with sales between $2.5 and $5 million, one company with sales between $1 and $1.5 million, three companies with sales between $250,000 and $999,000, and one company with sales in the range of $100,000 to $250,000.

Most companies export to the United States, and have been very successful, as evidenced by the expansion of exports in the last three years. In the Asia-Pacific region, Clearly Canadian exports to Japan and Hong Kong; Bourassa Canadian Water Company exports to Japan, Hong Kong and Taiwan; and Aqua 1 Beverage Company exports to Taiwan.

While medium-sized companies are beginning to pursue opportunities in the Asia-Pacific; larger companies are hoping to expand their presence. There is a strong belief that these emerging markets will bear fruit in the near future.

The Canadian Export Market

At present, the United States is the dominant market for Canadian bottled water. In 1990, 97.9 per cent of Canadian bottled water and 98.9 per cent of British Columbian bottled water were exported to the U.S. The second largest market for Canadian bottled water is Japan, which had an export market share of 0.73 per cent in 1990. Other markets where there is little Canadian presence, but where potential is high include Hong Kong, Taiwan, and Singapore. Table 1 shows Canada's most important export markets for bottled water.

Table 1a

Canadian Export Market 1990

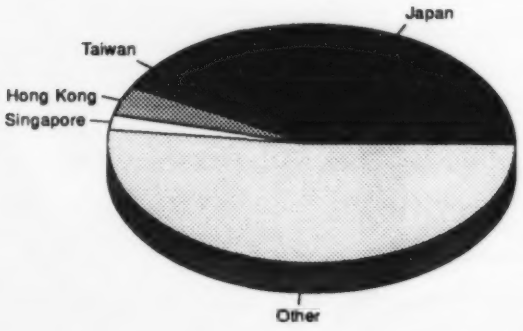
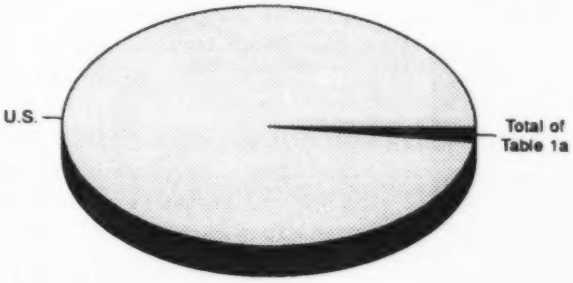


Table 1b



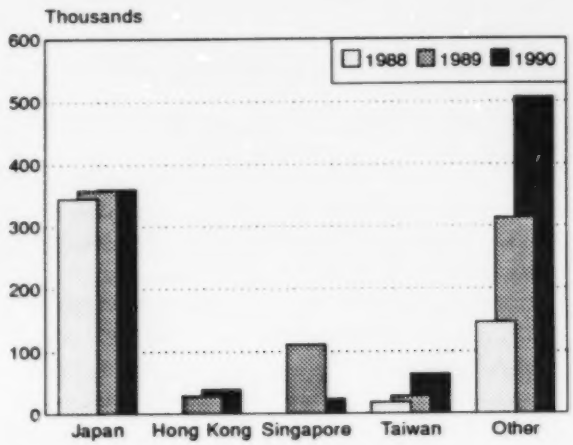
Source: Statistics Canada

Canadian and British Columbian bottled water exports have grown dramatically in the last three years. British Columbia exports grew by 975 per cent in this period, while Canadian exports grew by 760 per cent.

Almost all this growth is attributable to increased demand in the U.S market, though there has also been growth in the Japan, Taiwan and Hong Kong markets, as Tables 2 and 3 illustrate.

Table 2a

Volume of Canadian Exports by Country (litres)



Source: Statistics Canada

Table 2b

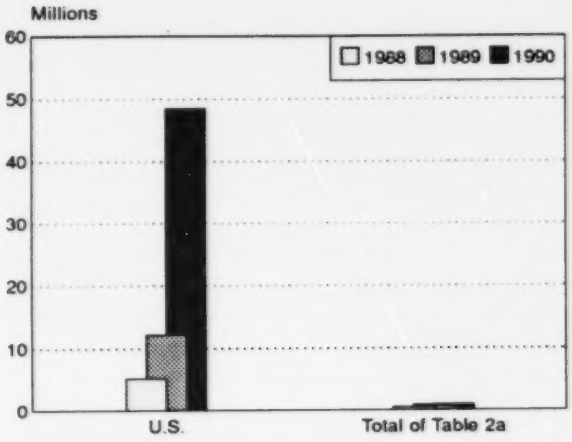
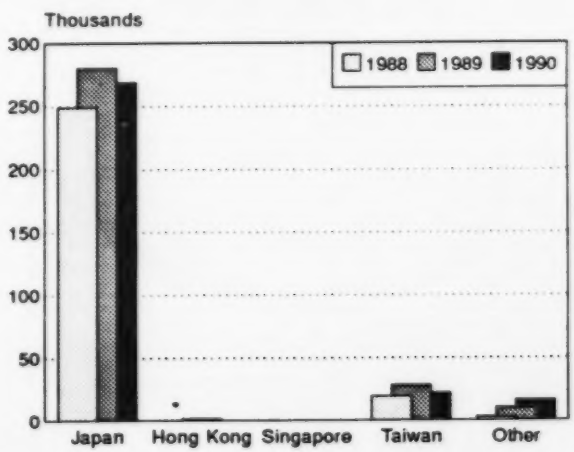


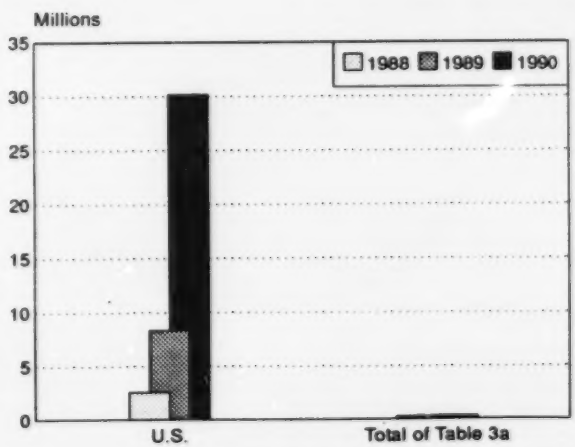
Table 3a

Volume of B.C. Exports by Country (litres)



Source: Statistics Canada

Table 3b



Japan

With the appreciation of the yen and the relaxation of import restrictions beginning in the mid-1980's, Canadian exporters began turning their eyes to the Japanese market. A number of Canadian bottled water companies are now expanding their presence in Japan, and with the market growing at over 84 per cent annually, more Canadians will discover this market in the future.

There are several reasons why confidence in the Japanese bottled water market is warranted. First, Japan's economic prosperity has resulted in the sophistication of the Japanese consumer. In the food and beverage industry, this has created a rising demand for high-quality products, which has boosted sales in the bottled water sector. Restaurants and bars are now avoiding the high chlorine levels in tap water by using bottled water to mix with *misuwari* (whiskey and water). Coffee bars are also using the product to improve the quality of their coffee. Perhaps the greatest symbol of demand for bottled water on the Japanese landscape is the existence of water bars, which sell glasses of water from around the world for between $1.72 and $2.75.

Another factor in the high rates of growth in this market is the increasing health-consciousness of the Japanese consumer. This is evidenced by comparable booms in the health food industry. Many Japanese consumers have turned away from alcohol and soft drinks and have adopted bottled water, fruit juices, and health drinks as an alternative.

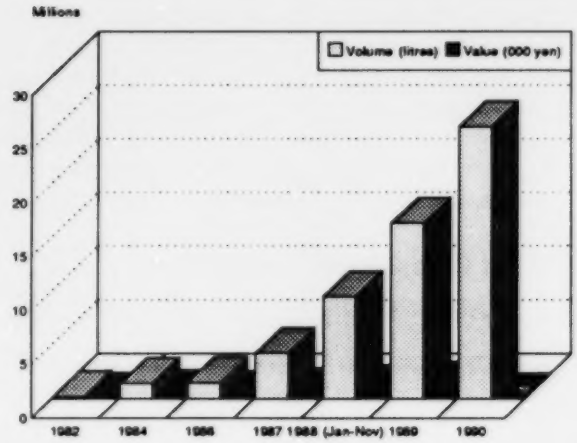
A final reason for the increase in imports occurred in 1986, with the relaxation of government regulations and standards. This reduced the cost of importation significantly and led to the introduction of many international brands to the market place.

Imports

Imports account for approximately 10 per cent of the bottled water market in Japan. Bottled water imports began in 1981 and grew to 25,343,000 litres by 1990. This represents an increase of 268 per cent over 1988. Table 4 summarizes this growth.

Table 4

Volume and Value of Imports



Source: Japan Trade Statistics
($ Can.=Yen 121)

Origin of Imports

France supplied 80.7 per cent of imported water to Japan in 1990. Though it still overshadows all other competitors, its market share has dropped 10 per cent since 1987. The worldwide withdrawal of Perrier products for a three-month period in 1990 is not reflected in Japanese government statistics, as France's market share of imports in 1989 was almost identical to its 1990 level.

Turkey is the second most dominant exporter of bottled water to Japan, with a 10.59 per cent market share. Canada ranks fourth, with a 2.39 per cent market share.

Though 1991 import statistics are not currently available, the Japan Mineral Water Association estimates that import sales will jump 137 per cent this year. There are no signs this robust growth will abate, as the market is far from saturated. In 1989, per capita consumption of bottled water in Japan was a mere 0.9 litres. France's per capita consumption was 80 litres, while the U.S.'s was 28 litres.

Canada's Exports to Japan

Canada exported 323,000 litres of bottled water to Japan in 1988. This figure rose 4.2 per cent in 1989 to 359,418 litres, and increased marginally in 1990 to 360,547 litres. Should Japan's import market grow as expected, Canada's exports have the potential to increase at a far greater rate than in 1990. As bottled water from B.C. represents approximately 75 per cent of Canadian bottled water produced, it is reasonable to assume B.C's exports to Japan will increase at a rate comparable to Canada's exports as a whole.

Tariff Classification and Duties

Japan has two classifications for bottled water.

- CCCN # 2201-10: Mineral waters and aerated waters not containing added sugar or other sweetening matter; ice and snow-3.2 per cent temporary tariff.
- CCNN # 2201-90: Others-free of duty.

Packaging

Bottled water in Japan comes in a variety of containers, depending on the channel of distribution. Bottles sold in restaurants and bars range in size from 200 ml to 330 ml, and come in both plastic and glass. The most popular sizes are Perrier's 200 ml and 330 ml glass bottles, but this may be less due to the packaging than to Perrier's aggressive marketing.

The most popular bottle for retail in small shops and supermarkets is the 1.5 litre flexible clear-plastic bottle. The 1.5 litre bottle is convenient for Japanese consumers, because it is small enough to carry home from a neighbourhood store, and big enough for family use.

Water also comes in 10 litre and 20 litre containers and is sold to hotels, sports clubs, restaurants and bars.

Channels of Distribution

Japan's distribution system has been described as Byzantine in nature, due to its multi-layered structure. Most food products are sold in small,

Table 5

Volume from Exporting Countries

Country	Volume (Kilolitres)
France	20, 465
Turkey	2,685
Norway	948
Canada	361
U.S.	208
Italy	203
R. Korea	52
U.K.	24
F.R. Germany	20
New Zealand	13
Finland	3
Other	366
Total	25,348

Source: Japan Trade Statistics

Table 6

Import Brands Available in Tokyo, July 1991

Brand	Origin	Size (mls)	Price (yen)
Koala Springs	Australia	285 gl	180
Bourassa	Canada	200 pl	200
Canadian Blue	Canada	3,800 pl	1,600
Canadian Rocky	Canada	340 can	120
Canadian Spring	Canada	750 gl	350
		270 gl	200
Naya	Canada	1,500 pl	250
Clearly Canadian	Canada	325 gl	250
Evian	France	1,500 pl	300
		1,000 pl	240
		500 gl	320
		250 gl	220
		330 pl	100
		500 pl	130
Vittel	France	1,500 pl	230
		500 pl	120
		330 pl	100
		250 gl	200
		500 gl	300
Perrier	France	750 gl	380
		330 gl	230
		200 gl	180
Volvic	France	1,500 pl	200*
		500 gl	250*
		500 pl	120*
Norwater	Norway	1,500 pl	230*
Ramlosa	Sweden	200 gl	180
Umashi Mizu	Turkey	1,500 pl	180

* December, 1990 prices
pl= plastic container
gl= glass container

family-run retail outlets, which are similar to corner stores in Canada. Though larger chain stores are becoming more numerous, the majority of Japanese consumers shop at convenient neighbourhood stores.

However, imported bottled water is not distributed to these small retailers, because these channels of distribution are effectively closed to foreign products. Therefore, imported bottled water is distributed either to hotels, restaurants, and bars, or to chain stores and wholesalers. Water for family consumption is sold by importers/producers directly to chain stores, department stores, liquor stores, and wholesalers, and exclusively through wholesalers to department stores. Water for commercial consumption is sold by importers directly to hotels, restaurants, and sports clubs and through wholesalers. Direct import retailers sell directly to all the above buyers, as well as to wholesalers. At present, most imported water is distributed through institutional markets as very little bottled water is consumed in the home.

Distribution Trends

The number of vending machines in Japan is equivalent on a per capita basis to the number of telephone booths in North America. Vending machines sell a wide variety of products, including beer and magazines and are now being used to sell bottled water.

The home delivery system in Japan has also been targeted by bottled water distributors. Many chain stores, liquor stores and other retail outlets provide home delivery. This is especially useful for bottled water, and importers are now selling cases of 12 or 24 bottles for home delivery.

Importers have recently begun selling water to health spas and fitness centres, as the people who use these facilities are most likely to be concerned about their health, and represent a target market for bottled water. They also help to build a healthful, trendy image for the bottled water company.

Competing Brands in the Japan Market

The table on page 9 summarizes the import brands available in the Tokyo market, as of July, 1991. Prices may be compared to domestic prices of 180-200 yen for a one litre plastic bottle, and 200 yen for a 1.5 litre plastic bottle.

Japanese Standards

Bottled water imports into Japan must pass inspection by the Japanese Ministry of Health and Welfare (see Government Organzations on page 12). The following is a list of specifications that must be met.

Specifications

- Water must not be turbid.
- Water must have no sedimentation.
- Arsenic, lead and cadmium must not be detected in the water. Limits: arsenic - below .2 ppm, lead - below .4 ppm, and cadmium - below .1 ppm.
- Tin content in the water must be under 150 ppm.
- Water must be coliform negative.

Manufacturing Standards

- Potable water must be used.
- Water must be pasteurized at a temperature of more than 85 degrees C. (The center-depth temperature) for longer than 30 minutes or by another method with equal or higher effectiveness in destroying any micro-organisms which might be present in the unprocessed water. An automatic filler must be used to fill the containers and the containers of water must then be pasteurized with equipment that has an automatic thermometer. A record of pasteurization must be kept for six months.

Pasteurization

Bottled water that meets the following manufacturing standards does not have to be pasteurized.

- Potable water must be used.
- The water must test negative for enterococus (facial streptcocci); spore-forming sulfate-reducing anaerobes; and pseudomonas aeruginosa. The water must also test negative for enterococcus and pseudomonas aeruginosa after bottling.

- The live bacterial count must be less than five per millilitre in the water when it comes out of the source.
- The live bacterial count of the water, immediately after it has been poured into containers, must not be more than 20 per millilitre.
- Only water taken directly from a spring can be used and an automatic filler must be used to fill the containers which must be stoppered or sealed immediately.
- The water must not be contaminated with pathogenic micro-organisms or substances which might be contaminated with pathogenic micro-organisms.
- Manufacturing processes other than precipitation, filtration, aeration and the installation and removal of carbon dioxide may not be employed.
- Facilities and equipment used in all manufacturing processes, including collection and filling, must be completely sanitary.
- All manufacturing processes must be conducted under strict sanitary conditions.
- Records of all test results for micro-organisms must be kept for six months.

Mineral water that is bottled in a sealed container with a carbon dioxide pressure of more than 1kg/cm2 at a temperature of 20 degrees C., does not need to be pasteurized if the unprocessed water is potable and if the processed water meets the requirements listed in the 'specifications' category.

Importers and Distributors

Sanko Sako Co., Ltd.
[Quill Natural Spring (Canada)]
c/o Horse Bldg. 4-10 Azuchimachi
Higashi-ku, Osaka
Tel: 06-262-3341
Fax: 06-262-5166

Ajinomoto Co., Ltd.
[Canadian Rocky (Canada)]
1-5-8 Kyobashi
Chuo-ku, Tokyo
Tel: 03-272-1124
Telex: 22690
Fax: 03-271-4185

Mitsubishi Heavy Industries Ltd.
[Canadian Blue (Canada)]
5-1 Marunouchi 2-choma
Chiyoda-ku, Tokyo 100
Tel: 03-212-9308
Fax: 03-216-3012

Shigematsu Trading
[Norwater (Norway)]
1-14-13 Moto Asakusa
Taito-ku, Tokyo
Tel: 03-843-4101
Fax: 03-843-4105

Happy World
[Ishiwa Seisui (R. Korea)]
Maruei Bldg., 19-10,
Jinnan 1-choma
Shibuya-ku, Tokyo 150
Tel: 03-454-2638
Fax: 03-461-0849

Osaka Kinoshita Shoji
[Aqui Sparkling Water (Switzerland)]
2-4-41 nakazaki Nishi
Kita-ku, Osaka
Tel: 06-371-9331
Fax: 06-374-1203

Mitsui Toatsu Co., Ltd.
[Quebec (Canada)]
No. 1 Nurihiko Bldg.
2-9-2 Kyobashi Chuo-ku, Tokyo
Tel: 03-243-1541
Fax: 03-561-6329

Marubeni Foods (Marubeni Shokuryo)
[Vittel (France)]
3-3-2 Highashi Shinagawa
Shinagawa-ku, Tokyo
Tel: 03-472-5431
Fax: 03-472-6929
Telex: J22326 ATTN MFDA700

Tokyo Reporters Associates
[Scotish Water (United Kingdom)]
Maison Yoyogi Bldg., Yoyogi
Shibuya-ku, Tokyo
Tel: 370-5503

Takara Shuzo
[Ramlosa (Sweden)]
Higashinotoin-Higashiiru, Shijodori
Shimogyo-ku, Tyoto 600
Tel: 075-241-5100
Fax: 075-211-6385

Nishaho Iwai Corp.
[Ashbon (England)]
Akasaka 2-4-5 Minato-ku
Tokyo 107
Tel: 03-588-2111

Mountain Valley Water Co., Ltd.
[Mountain Valley (U.S.A.)]
Okamoto 7-14-15-613
Higashinada-ku
Kobe-shi 658

Yutaka Sangyo Co., Ltd.
[Mendocino Mineral Water (U.S.A.)]
Tokyo Kaujyo Bldg.,
1-2-1 Marunouchi
Chiyoda-ku, Tokyo
Tel: 03-213-8161
Fax: 03-213-8160

C. Itoh & Co., Ltd.
[Evian (France)]
Kita Aoyama 2-5-1
Minato-ku, Tokyo
Tel: 03-497-2121

Kagoma Co., Ltd.
[San Pellegrino (Italy)]
Nihombashi 2-20-7 Chou-ku
Tokyo 103
Tel: 03-861-7611

Sunhealth Co., Ltd.
[Valser (Switzerland)]
Kyobashi 3-2-8 Chou-ku
Tokyo 104
Tel: 03-588-2111

Perrier Japon K.K.
[Perrier; Volvic (France)]
Jingumae 4-2-11,
Shibuya-ku
Tokyo 150
Tel: 03-408-8321

Government Organizations

Ministry of Health and Welfare
Environmental Health Bureau
Food Sanitation Division
Office of Port Health Administration
Kasumigaseki 1-1-2 Chiyoda-ku
Tokyo 100-45
Tel: 03-503-1171

Ministry of Agriculture, Fisheries and Forestry
Food and Marketing Bureau
Groceries Oils and Fats Division
Food and Marketing Bureau
Consumers' Economy Division
Kasumigaseki 1-2-1 Chiyoda-ku
Tokyo 100
Tel: 03-502-8111

Trade Organizations

Japan Soft Drink Bottlers Association
Koishikawa 2-4-17, Bunkyo-ku
Tokyo 112
Tel: 03-514-0666

Mineral Water Association of Japan
Tomoni Bldg, 3F Shinjuku-ku
Tokyo 180
Tel: 03-350-9100

Republic of Korea

Table 7

Imports into Korea by Country of Origin

Year	HS # *	Volume (litres)	Country
1989	2202-101	115,200	Japan
	2202-109	14,400	Taiwan
		17,726	U.S.
		50,797	Canada
		1,092	Other
1990	2202-101	62,600	Total
	2202-109	126,143	Total

* HS 2202-101: Coloured mineral or aerated water with sugar or flavouring added.
HS 2202-109: Others

Source: Korea Trade Statistics

At present the importation of mineral and aerated waters that are not sweetened or flavoured are restricted from sale to the domestic market in South Korea. For this reason, import information for bottled water is hypothetical and scant at best. Further, it is not likely that South Korea will open its market to bottled water in the near future, though the country is facing considerable pressure on related matters, as it is a signatory to GATT.

Imports

Though South Korea does not allow bottled water to be sold to the domestic market, there is a market for this product in foreign and military communities. The following is a list of import volumes for 1990.

Tariff Classification

- HS 2201-101: Restricted from import (mineral and aerated water not containing sugar or flavourings, ice and snow).
- HS 2202-101 and 109: 16 per cent import duty.

Packaging

Bottled water in South Korea comes in .9 litre, 1.8 litre and 18.9 litre plastic or glass containers. Customers prefer the 18.9 litre plastic bottle.

Labelling Requirements

Labels on imported waters (flavoured or sweetened) must include the source of origin, the name of the importer, the address and telephone number of the importer, business license number, net and drained weight, validity date, name and contents of added ingredients, name of location for returned goods, and storage instructions, all in Korean.

Channels of Distribution

Domestic water is distributed directly to offices, homes and supermarkets by domestic water suppliers.

Pricing

The average market prices for domestic bottled water are as follows. ($ Can.= Won 636.9)

.9 litre=Won 380
1.8 litre=Won 500
18.9 litre=Won 3,500

Prices for imported products are not currently available.

Standards

The following is a list of government standards for domestic drinking water:

- Ammonia maximum 0.5 mg/l.
- Nitrate maximum 10 mg/l.
- Chloride maximum 150 mg/l.
- Bacteria maximum /100 ml.
- Coliform group negative /50 ml.
- Cyanide negative.
- Mercury negative.
- Organic phosphorous negative.
- Copper maximum 1 mg/l.
- Iron maximum 0.3 mg/l.
- Manganese maximum 0.3 mg/l.
- Fluoride maximum 1 mg/l.
- Lead maximum 0.1 mg/l.
- Zinc maximum 1 mg/l.
- Chromium maximum 0.05 mg/l.
- Arsenic maximum 0.05 mg/l.
- Hardness maximum 300 mg/l.
- Sulfate maximum 200 mg/l.
- Cadmium maxiumum .01 mg/l.
- PH value 5.8-8.5.
- No foreign odour or taste.
- Colour maximum 5 degrees.
- Turbidity maximum 2 degrees.
- Evaporating residue maximum 500 mg/l.
- Total tribalomethane maximum 0.1 mg/l.

Distributors

Diamond Pure Water Co., Ltd.
165-14 Yeonhi-Dong
Sodaemun-Ku
Seoul
Fax: 335-2151
Attn: Mr. D.J. Lee, President

Koryo Jonghap Co., Ltd.
1618-13 Seocho-Dong
Seccbo-Ku, Seoul
Fax: 504-6665
Attn: Mr. Kim Suk Jin, Presedent

Bum Yang Foods Co.,Ltd.
2028-1 Bisan 7-Dong
Sec-Ku, Taegu City
Fax: N/A
Attn: Ms. Lee Jung Soon, President

Saffire Pure Water Co.,Ltd.
188-2 Yeonhi-Dong
Seoddamun-Ku, Seoul
Fax: N/A
Attn: Mr. Yeo Duk Jr., President

Bottled Sansu Co., Ltd.
184-6 Sukchun-Dong
Songpa-Ku, Seoul
Fax: 417-4542
Attn: Mr. Ji Lu Sik, President

Scrak Beverage Co., Ltd.
109-12 Samsung-Dong
Kangnam-Ku, Seoul
Fax: 511-4700
Attn: Mr. Kim Ro Sik, President

Sparkle Co., Ltd.
136-1 Mapo-Dong
Mapo-Ku, Seoul
Fax: 718-4885
Attn: Mr. Jang Yang Ju, President

Cheji Mineral Water Co.,Ltd.
653-25 Deungchon-Dong
Kangsec-Ku, Seoul
Fax: 697-7[illegible]39
Attn: Mr. Yu Ha Mook

Jinro Beverage Co., Ltd.
1446-1 Seocho-Dong
Seocho-ku, Seoul
Fax: 586-5224
Attn: Mr. Jang Kun Yong, President

Crystal Water Co.
235-89 Seobinggo-Dong
Yongsan-Ku, Seoul
Fax: N/A
Attn: Mr. Yoon Jung Hyo, President

Puimuwon Saemul Co. Ltd.
97 Moonjung-Dong
Songpa-Ku, Seoul
Fax: 408-3598
Attn: Mr. Namseong Woo, President

Korea Crystal Pure Water Co.,Ltd.
94-2 Nonhyun-Dong
Kangmam-Ku, Seoul
Fax: 547-4125
Attn: Mr. Lee Byung In, President

Seobim Ltd.
921-1 Ingok-Ri
Jiniong-Myun
Buchang-Kun, Kyungnam Province
Fax: N/A
Attn: Mr. Shin Sung Il, President

Inwha Co., Ltd.
126-1 Chojung-Ri
Bukil-Myun, Chungwon-Kun
Choongnam Province
Fax: N/A
Attn: Mr. Hong Sung Pyo, President

Hong Kong

Table 8

Imports into Hong Kong by Country of Origin (litres)

Origin	1988	1989	1990
France	4,844,899	6,398,333	6,755,737
China	647,837	532,208	212,276
U.S.	328,681	526,504	604,073
Taiwan	176,218	60,678	27,420
Canada	0	29,515	39,485
Other	888,936	338,432	1,637,320
Total	6,886,571	7,885,670	9,276,311

* Mineral and spa waters non-aerated, non-alcoholic

Source: Hong Kong Trade Statistics

Hong Kong does not represent a major market for Canadian bottled water at present, receiving only 0.08 per cent of Canadian exports. Some effort has been made to enter the Hong Kong market in recent years, though with limited success in terms of volume or market share. As in other countries, French waters dominate the import market with a 72.8 per cent market share. In contrast, Canada represents approximately one quarter of one percent of the market.

One impediment to Canadian companies in Hong Kong is the popularity of local brands. The two most popular brands of mineral and distilled waters on the market are manufactured in Hong Kong. Hong Kong is also the world's ninth largest exporter of bottled water, and as such, exports far more bottled water to Canada than Canada exports to Hong Kong.

However, the market for imported water is growing steadily in Hong Kong, and Canadian bottlers should be able to gain market share in the years to come, by actively promoting Canada's image as having a clean, healthful and invigorating environment. This has led to much success for Canadian companies in Japan.

Imports

Imports of non-aerated bottled water have increased by 34.7 per cent in the last three years, with France gaining the most market share, and the U.S gaining somewhat less. Canada's exports to Hong Kong increased from nothing in 1988, to 29,515 in 1989 and 39,485 in 1990. Canadian exports are growing steadily and will continue to do so.

Tariff Classification

Hong Kong divides imported waters into two classifications

- # 111011: Aerated Waters
- # 111012: Waters spa or mineral non-aerated and non-alcoholic.

As a free port, Hong Kong applies no duty or tariffs to bottled water, whether aerated or non-aerated. Automobiles, cosmetics, alcohol and tobacco are the only four commodities that are charged duty in Hong Kong.

Table 9

Brands Available in Hong Kong, April 1991

Brand	Size	Origin	Retail Price Now	Retail Price 1 Year Ago
Perrier (Mineral Water)	750 ml/Glass Bottle	France	HK $8.95	HK $8.90
Perrier	330 ml/Glass Bottle	France	HK $4.90	HK $4.90
Pierval (Natural Spring Water)	1.5 l/Plastic Bottle	France (imported by A.S. Watson)	HK $8.20	HK $6.90
Pierval	500 ml/Plastic Bottle	France	HK $4.10	HK $3.50
Vittel (Mineral Water)	1.5 l/Plastic Bottle	France (imported by A.S. Watson)	HK $10.90	HK $8.90
Vittel	500 cc/Plastic Bottle	France	HK $5.50	HK $4.20
S. Pellegrino (Carbonated Mineral Water)	250 ml/Glass Bottle	Italy	HK $4.30	HK $4.30
S. Pellegrino	750 ml/Glass Bottle	Italy	HK $9.40	
Evian (Spring Water)	1.5 l/Plastic Bottle	France	HK $12.80	
Bonaqua (Mineral Water)	1.5 l/Plastic Bottle	Hong Kong (bottled by Swire Coca Cola's Product)	HK $5.50	
Rochemaure (Spring Water)	1.5 l/Plastic Bottle	France	HK $7.50	
San Benedetto (Sparkling Spring Water)	0.5 l/Plastic Bottle	Italy (distributed by A.S. Watson)	HK $3.60	
San Benedetto	2 l/Plastic Bottle		HK $8.50	
Park 'n Shop (Mineral Water)	0.5 l/Plastic Bottle	Hong Kong	HK $3.30	

($Can.=HK 6.8)

Packaging

Water for domestic and retail consumption is packaged in glass or plastic bottles and ranges in size from 330 ml to 1.5 litres. The best selling package is the 1.5 litre plastic bottle, as bottled water in Hong Kong is consumed mostly at home.

Labelling Requirements

In August of 1987, Hong Kong updated its labelling requirements to include the following: name, ingredients, minimum durability, name and address of manufacturer/packager, count, weight and volume, and conditions for storage or instructions for use. With the exception of the indication of minimum durability which must be in English and Chinese, the language used in marking or labelling may be English, Chinese, or both.

Channels of Distribution

Domestic bottled water in Hong Kong is distributed directly from manufacturers to retail outlets and institutional clients. Smaller retail outlets buy bottled water from the larger retailers. Swire Bottler, which produces the best-selling Bonaqua, has a sales team of 170 people who sell directly to these clients.

Imported bottled water in Hong Kong is either imported and distributed by retail chains or is imported by trading firms and distributed by the retail chains. A.S Watson is the importer and sole

distributor of Pierval, Vittel and San Benedetto. They distribute mainly to retail and institutional outlets through direct sales. Smaller retailers are reached through "jobbers", or brokers who handle a variety of snacks, ice-creams, and drinks in small quantities.

Wellcome is Hong Kong's second largest supermarket chain, with a market share of 20 per cent. Wellcome imports some brands directly and procures others through trading firms. They act as a retail outlet and do not further distribute imported water.

In contrast to Japan, most bottled water in Hong Kong is bought in supermarkets and other retail outlets. The only brands available in hotels or restaurants are Perrier, Bonaqua and Watson's.

Market Share of Leading Brands

The most popular mineral water is Bonaqua, with a market share of 53.8 per cent, based on percentage rates of consumption. The next most popular mineral waters are Geyser, with 15.3 per cent, Pierval with 12.8 per cent, Evian with 10.3 per cent and Perrier with 7.7 per cent.

Distilled waters are extremely popular in Hong Kong, with 51 per cent of the population buying it in 1990, as compared to 31 per cent for mineral water. The leading brand is Watson's with 62.7 per cent market share, followed by Geyser with 16.4 per cent, Fountain and Cool with 9 per cent and Bonnie Hubbard with 3 per cent.

Standards

All food products imported into Hong Kong must be accompanied by a health certificate issued by competent authorities of the country of origin. Specific requirements for the importation of water may be obtained from the Hong Kong Department of Health Headquarters, Information and Public Relations Unit. (See Government Organizations).

Importers and Distributors

Wellcome Company Ltd.
7016-7025 East
Roof Floor, ATL Centre
Berth 3, Container Terminal
Kwai Chung, N.T., Hong Kong
Tel: (852) 489-5888
Fax: (852) 489-9627

Park' N Shop
9 Watson House
1-5 Wo Liu Hang Road
Fo Tan
Tel: (852) 606-8833
Fax: (852) 602-2914

Other Retail Outlets and Convenience Stores

HK Convenience Stores Ltd. (Seven-Eleven)
Block A, Room 401
Seaview Estate, 2-8 Watsons Road
North Point, Hong Kong
Tel: (852) 802-6868
Fax: (852) 802-6827

Circle K. Convenience Stores (HK) Ltd.
3/F, Witty Commercial Bldg.
1A - 1: Tung Choi Street
Mong Kok, Kowloon, Hong Kong
Tel: (852) 388-0883
Fax: (852) 385-7843

Yaohan Department Store (HK) Ltd.
8/F., Evergain Building21-23, Yuen Shun Circuit
Shatin, N.T., Hong Kong
Tel: (852) 636-5338
Fax: (852) 636-5770

Seiya Asia Ltd.
Room 1305-06, EAst Tower
Bond Centre, 89 Queensway
Central, Hong Kong
Tel: (952) 868-3181
Fax: (852) 868-5926

Government Organizations

Senior Superintendent (Foods)
Hygiene Division
Department of Health
8/F., Fa Yuen Street, UC Complex
123A Fa Yuen Street
Kowloon, Hong Kong
Fax: (852) 787-4564
Tel: (852) 392-0396

Department of Health Headquarters
Information and Public Relations Department
Fax: (852) 881-8552

Singapore

The bottled water market in Singapore is similar to the Hong Kong market, as viewed by Canadian exporters. At present, Singapore is a very small market, representing approximately .04 per cent of Canadian bottled water exports. Though Singapore is not a significant market at present, it represents a market that should be pursued.

Imports

Though Singapore is a large exporter and re-exporter of bottled water, import levels have expanded in recent years, and are expected to grow further over the next few years. As in Hong Kong and Japan, increased affluence and health consciousness are the factors driving expansion. Imports are likely to grow by 30 per cent this year. This is good news for Canadian exporters, who as yet have not realized their potential in this market.

Canadian exports to Singapore grew to 110,880 litres in 1989 before falling to 23,760 litres in 1990. The market as a whole also experienced some shrinkage in 1990. However, the Singapore market is expected to grow significantly in the coming years, and opportunities for British Columbian bottlers to gain market share and increase exports are good.

Tariff Classification

- HS 2201.10: Waters including mineral and aerated waters not sweetened or flavoured, ice and snow.
- HS 2201.90: Other.

The importation of all bottled waters into Singapore is duty-free.

Packaging

Bottled water is packaged in a variety of plastic and glass bottles. The most popular package is the 1.5 litre plastic bottle, which is consistent with water's mostly retail distribution in Singapore.

Labelling Requirements

The product label should bear the following information:

- common name of the product
- amounts of sodium, calcium, potassium, magnesium, chloride, sulfate and bicarbonates present
- volume
- source from which the water is exploited

Table 10

Imports into Singapore by Country of Origin (litres)

Origin	1988	1989	1990
France	3,201,916	4,172,387	3,706,470
China	2,029,896	2,136,053	1,512,266
Belgium	447,840	454,338	473,333
Netherlands	66,888	729,337	472,422
Taiwan	150,218	441,342	423,844
Canada	0	110,880	23,760
Other	1,099,009	844,639	1,640,440
Total	6,995,767	8,888,976	8,252,535

Source: Singapore Trade Statistics

Table 11

Brands Available in Singapore, January 1991

Brand	Country of Origin	Volume	Retail Price
Highland	Scotland	330 ml	S. $0.75
		1.5 l	S. $1.35
Aqua	Indonesia	220 ml	S. $0.40
		500 ml	S. $0.75
		1.5 l	S. $1.35
Vittel	France	1.5 l	S. $1.90
SPA	Belgium	1.5 l	S. $1.50
Avilon	France	1.5 l	S. $1.25
Volvic	France	50 cl	S. $0.90
		1.5 cl	S. $1.80
Evian	France	500 ml	S. $1.10
Ballantyne	Australia	2 l	S. $2.60
Eau de france	France	1.5 l	S. $1.45
Fontessa	Switzerland	33 cl	S. $1.40
Seletaris	Singapore	1.5 l	S. $0.95
Laoshan	People's Republic of China	640 ml	S. $1.10
Vichy	France	1 l	S. $1.90
Naya	Canada	1.5 l	S. $1.20
Allswell	Taiwan	600 cc	S. $0.75

($Can.=1.5 S.)

- country of origin, and
- name and address of importer.

Channels of Distribution

Bottled water is usually distributed through wholesalers and food brokers who sell to the retail and institutional markets. Although figures for retail and institutional consumption are not available, it is evident that the majority of bottled water is distributed through retail outlets such as supermarkets, as opposed to institutional markets, such as restaurants and hotels.

Competing Brands in the Singapore Market

Perrier commands a large percentage of the market share, positioning itself as a premium product. Despite the worldwide withdrawal, which caused the local distributor to destroy 130, 000 litres, Perrier has maintained its lead.

Indonesian mineral waters under brand names such as Aqua, VIT, Ocean, Adis, Fresh and Aquaria are gaining rapid market penetration with a low end pricing strategy. Due to lower packing, freight, distribution and other related costs, Indonesian companies can offer a 1.5 litre bottle for S. $0.40 to $0.85 less than French brands.

Bourassa Canadian glacial water and Fifth Avenue Seltzer's flavoured mineral water were recently introduced by the supermarket chain Cold Storage, at the Canadian Food Promotion in June.

Standards

The import of bottled natural mineral water should comply fully with the provisions of the Food Regulations Act 1988, and the following special requirements for natural mineral waters.

1. Natural mineral water shall be underground water obtained directly from underground water-bearing strata. It shall be characterized by its content of certain mineral salts and their relative proportions, and the presence of trace elements or of other constituents. Natural mineral water shall include spring water.

2. Natural mineral water shall not be subjected to any treatment other than:

   a) filtration or decanting, preceded if necessary by oxygenation, to remove the unstable constituents, provided that such treatment does not alter composition of the water in respect of its stable constituents;

   b) the total or partial elimination of carbon dioxide by exclusively physical methods;

   c) the addition of carbon dioxide, provided that the water is labelled with the appropriate description.

3. a) Natural mineral water shall contain not more than:

   i) 0.05 ppm of arsenic.

   ii) 1.ppm of barium.

   iii) 0.01 ppm of cadmium.

   iv) 0.05 ppm chronium (vi).

   v) 0.05 ppm lead.

   vi) 2 ppm of manganese.

   vii) 0.001 ppm of mercury.

   viii) 0.01 ppm of selenium.

   ix) 30 ppm of borate.

Taiwan

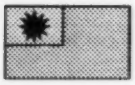


Table 12

Imports into Taiwan by Country of Origin (kilograms)

Origin	1988	1989	1990
U.S.	3,375	2,831,774	5,181,457
Singapore	0	6,168,933	4,435,271
France	654,003	2,243,291	3,292,757
Hong Kong	6,547	3,089,309	2,324,215
Canada	19,008	28,443	63,712
Other	408,315	13,116,518	15,297,412
Total	1,091,248	27,478,268	21,721,953

Source: Taiwan Trade Statistics

Taiwan is Canada's third largest export market for bottled water after the United States and Japan. Though it receives only 0.12 per cent of Canadian total exports at present, Taiwan is seen as a growing market, with much opportunity for British Columbia water companies.

Imports

Taiwan saw a boom in bottled water imports between 1988 and 1989. Though levels dropped in 1990, Taiwan represents a strong market for British Columbia bottled water. Canadian imports increased 235 per cent between 1988 and 1990. Total imports, however, followed a less stable pattern, with large growth in 1989 and a marked decline in 1990. Statistics for the first four months of 1991 show further decline, though these figures do not include the summer months, when beverage sales peak.

Though this pattern of a high peak followed by a significant decline is indicative of a short product life-cycle, the consumption of bottled water in Taiwan cannot be written off as a trend. It is expected demand for imported water will increase as the natural environment of Taiwan continues to erode. Already Taiwan's ground water is polluted with waste from industry and humans, and people must either boil water or buy packaged water. This fact, combined with Taiwan's level of affluence, points to higher levels of consumption in the near future.

As American bottlers have dominated this market for many years, and have competed successfully against European and Asian brands alike, there is little to suggest Canadian bottlers cannot do the same, and gain market share in the years to come.

Tariff Classification

Taiwan classifies mineral water under the Harmonized System. Mineral waters and aerated waters are levied an import tariff of 10 per cent of C.I.F for Column 1 countries and 7.5 per cent of Column 2 countries. Canada is considered a Column 2 country.

Packaging

Bottled water comes in a variety of packages in Taiwan, the most popular of which is the 1.5 litre plastic container. Another popular size is the .5 litre, although the 1.5 litre size sells twice as well as this smaller container.

Labelling Requirements

The following items are required to appear on all bottled water labels:

- Importer's company name
- Manufacture date
- Expiry date
- List of ingredients
- Foreign manufacturer's company name.

Channels of Distribution

Bottled water is distributed to the Taiwan consumer in three different ways.

1. Directly distributed to supermarkets, hotels and restaurants by importers.
2. Imported through importers to local agents and distributed to supermarkets, hotels and restaurants.
3. Imported by large food chains and retailed exclusively through their retail outlets.

The most efficient channel of distribution is the first described, due to local price competition.

Competing Brands in the Taiwan Market

Prices for a 1.5 litre container of domestic water range from N.T. $18-22, while imported waters cost between N.T. $26-58. This price differential has not deterred the Taiwanese from buying imported mineral water, as much of the appeal of foreign water is its prestigious image. It is also considered healthier and purer than the domestic product.

Standards

There are no packing, certification or nutritional labelling requirements. The Ministry of Health conducts random samples from store shelves to assure bottled water meets standards set by the China National Standard's Mineral Water Inspection Method.

Importers and Distributors

World Yac's Taiwan Inc.
180 Yen Chi Street
Taipei, Taiwan
Fax: (02) 721-2770
Tel: (02) 776-4711
Contact: Mr. Ku, Trade Department

Euroway Enterprise Co., Ltd.
6/F, 604 Ming Sheng E. Rd.
Taipei, Taiwan
Fax: (02) 713-4175
Tel: (02) 717-1635
Contact: Ms. Renee Hsiang

Kwang Hong Trading Co., Ltd.
No. 42, Lane 20, Hsin Tung Street
Taipei, Taiwan
Fax: (02) 769-1122
Tel: (02) 767-7283
Telex: 24577 TAHONGCO
Contact: Ms. Mei-Yueh Chen

China Industrial Management Co., Ltd.
3/F, 219 Chung Hsiao E. Rd., Sec. 4
Taipei, Taiwan
Fax: 902) 731-0951
Tel: (02) 771-9935
Contact: Mr. Huang

Morrison & Co., Ltd.
12/F, 112 Chung Shan N. Rd., Sec. 2
Taipei, Taiwan
Fax: (02) 563-4824
Tel: (02) 563-3881
Telex: 21633 Morico
Contact: Mr. Cheng, General Manager

Sing Ho Shing Enterprise Co., Ltd.
9/F, 360 Chung Hsiao E. Rd., Sec. 4
Taipei, Taiwan
Fax: (02) 755-6111
Tel: (02) 709-2662

(continued on page 26)

Table 13

Import Brands Available in Taiwan, September 1991

Brand	Per Bottle	Retail Price
Naya (Quebec/Canada)	1,500 ml	NT $58/bottle (per bottle)
Quill (Saskatchewan/Canada)	1,500 ml	NT $100 for 3 bottles
Perrier (France)	750 ml	NT $53/glass bottle
	330 ml	NT $39/glass bottle
Evian (France)	1,500 ml	NT $42/bottle
Saint Amand (France)	1,500 ml	NT $26/bottle
Avion (France)	1,500 ml	NT $29/bottle
	150 ml	NT $11/bottle
Vittel (France)	1,500 ml	NT $45/bottle
	500 ml	NT $30/bottle
Ramlosa (Sweden)	330 ml	NT $44/bottle
	220 ml	NT $37/bottle
Highland (Scotland)	1,500 ml	(not available)
	330 ml	(not available)
Jurel (Europe)	1,500 ml	NT $34/bottle
Spa (Holland)	1,500 ml	NT $40/bottle
	500 ml	(not available)
	330 ml	(not available)
	250 ml	NT $27/glass bottle
Apollinaris (West Germany)	1,000 ml	NT $60/bottle
	200 ml	NT $32/bottle
Christinen (West Germany)	1,000 ml	NT $54/bottle
	250 ml	NT $26/bottle
Chaud Fontaine (Belium)	1,500 ml	(not available)
Aqua (Indonesia)	1,600 ml	NT $36/bottle
	220 ml	NT $9/bottle
Han Hsiang (South Korea)	1,800 ml	NT $25/bottle

($Can.=23.1 N.T.)

Table 14

Domestic Brands Available in Taiwan, September 1991

Brand	Per Bottle	Retail Price
E-Hon	1,500 ml	NT $18/bottle
	600 ml	NT $9/bottle
Hai-Kang	1,500 ml	NT $19/bottle
	600 ml	NT $10/bottle
Chi-Kang	1,500 ml	NT $19/bottle
	500 ml	NT $10/bottle
Pin-Kang	1,500 ml	NT $19/bottle
Chu-Kang	1,550 ml	NT $20/bottle
Rosa	1,500 ml	NT $20/bottle
Vienna	1,500 ml	NT $20/bottle
Shan-Nei	1,500 ml	NT $20/bottle
	220 ml	NT $5/plastic cup
Yiog-Chuan	1,660 ml	NT $20/bottle
	600 ml	NT $9/bottle
Hsien-Chin	1,500 ml	NT $18/bottle
	600 ml	NT $9/bottle
Tung-Yang	1,500 ml	NT $17/bottle
	600 ml	NT $9/bottle
Hsiu Hu-Pao	1,500 ml	NT $21/bottle
	350 ml	NT $10/aluminum cans
Shastar	1,500 ml	NT $22/bottle
	600 ml	NT $10/bottle
Life 200	2 l	(not available)
Taiwan Sugar	20 l	NT $180/plastic tank
	6 l	(not available)
	1,500 ml	(not available)
Parliament	20 l	NT $500/plastic tank
	20 l	NT $700 for 2 tanks
	5 l	(not available)
	1,200 ml	(not available)

G. Crown Industrial Co., Ltd.
2/F 143 Hsin Yi Rd., Sec. 4, Taipei, Taiwan
Fax: (02) 703-4323
Tel: 902) 700-7128
Telex: 14201

King Health Enterprise Co., Ltd.
Room B, 5/F, No. 7, Lane 23, Shuang Chen St.
Taipai, Taiwan
Fax: (02) 595-3019
Tel: (02) 594-2029

Gimo International Commerce Co., Ltd.
2/F, 152 Chung Shan N. Rd., Sec. 6
Taipei, Taiwan
Fax: (02) 837-2141
Tel: (02) 831-0230
Telex: 27522 GIMO

Food Chains

Wei-Chuan Foods Corporation
125 Sung Chiang Rd.
Taipei 10429, Taiwan
Fax: (02) 507-0623, (02) 506-5473
Tel: (02) 507-8221
Telex: 11403 WEICHUAN
Contact: Mr. Chao-Mei Wu, Manager, International Dept.

President Enterprises Corp.
Carbonated Drink Division
472 Chung Hua Rd., Sec. 4
Hsin-Chu City, Taiwan
Fax: (035) 380071
Tel: (035) 385171
Contact: Mr. Tsa, Division Manager

Canada's Competitive Advantage

The world's image of Canada as a clean, unpolluted country blessed with pristine wilderness and rugged mountains is a key factor in the success of Canadian bottled water in the foreign market. Most bottled water companies reinforce this image by incorporating pictures of mountains, glaciers and snow into their product labels. Tourism advertising reinforces Canada's image as a healthful place with wide-open spaces.

Canada is also seen as a developed country with the technological wherewithal to produce water under sanitary conditions. This, combined with Canada's natural environment, gives Canada a distinct advantage in the world market.

British Columbia producers have an added advantage in their geographic location by the Asia-Pacific region. Our strong tourism link with Japan has helped form the above-mentioned Canadian image, and has heightened awareness of all Canadian products in the Japanese market. As tourism from the Asia-Pacific region grows in the years to come, British Columbia's image will be strengthened, and the bottled water industry will benefit.

Finally, British Columbia's location gives its companies a competitive advantage in lower transportation costs. European companies must contend with higher shipping costs which contribute to higher retail prices in Asia.

Future Prospects

At present, Canada is not a major player in the world bottled water market, despite having some of the best mineral water in the world. In the near future, Canada should be able to achieve much of its vast potential. In many of the markets surveyed, including Singapore, Hong Kong and Taiwan, there is great opportunity for British Columbians to gain market share and to become significant exporters. Much has already been accomplished in a short period of time.

Though the United States will continue to dwarf all other markets for British Columbia bottled water, producers will find several viable markets in the Asia-Pacific region. The Japanese market is expected to continue growing at a faster rate than any other market, as health concerns and status consciousness become more prevalent and income levels rise. The Japanese market represents the greatest opportunity for the British Columbia industry.

Canadian exports to Hong Kong, Singapore, South Korea and Taiwan have been minimal to date, while British Columbia exports have been even less encouraging. Greatly overshadowed by Japan, these markets have been paid scant attention in the past. However, several British Columbia companies are now pursuing opportunities in these markets. It is likely that consumption in these markets will increase, as it has in Japan, for similar reasons. Increasing affluence, health and status-consciousness are now a part of the social landscape.

Though Canadians have made little penetration into these markets so far, there is no reason for a greater presence not to develop. It must be stressed that British Columbia bottlers have only been exporting to the Asia-Pacific region for a few years. In time and with concerted effort, awareness of the British Columbia product will grow. Through steady promotion of the product, and the careful cultivation of trade relationships with importers and distributors, market share will be gained.

Since most of the examined markets have at least 20 brands of bottled water, competition is high and market penetration is not easy. British Columbian entrepreneurs must be careful to address the following issues, in order to succeed.

A) High Standards of Quality

Products must conform to very high standards if they are to appeal to consumers in the Asia-Pacific. With increasing health consciousness, Asians are becoming discerning consumers.

B) Reliability of Supply

British Columbian exporters must work to ensure consistent service and reliable supply. In Asia, a relationship begins with a sale, and the emphasis on service is extremely high. If Canadians can provide this aspect of the business relationship, distributors will be attracted to the product, and distribution networks will grow.

C) Aggressive Marketing Strategies

British Columbia exporters must employ a high impact marketing plan. This should include participation in trade shows, in-store promotions, sampling campaigns, informative catalogues, brochures, and trade incentives. Skill in attracting media attention and shaping publicity is of great importance.

D) Competitive Pricing

Canadian water should not establish itself at the bottom of the pricing structure, as it is not feasible to compete with lower prices offered from countries such as Indonesia. A mid-range pricing strategy is most effective, as Canada can offer water equal in quality to European water, but at a reduced price.

Appendix 1a

Shipping Information
Full Container Load Rates from Vancouver, British Columbia

Destination	20' Container	40' Container	Surcharge*
Japan Base Port	US$ 1,775	US$ 2,075	CAF/FAF
Korea	US$ 1,950	US$ 2,300	CAF/FAF
Taiwan	US$ 1,875	US$ 2,200	CAF/FAF
Hong Kong	US$ 1,956	US$ 2,310	FAF
Singapore	US$ 2,200	US$ 2,675	CAF/FAF
Port Kelang	US$ 2,300	US$ 2,775	FAF

* Plus applicable terminal charges
USD: U.S. Dollars
CAF: Currency Adjustment Factor
FAF: Fuel Adjustment Factor
Rates quoted by NYK Line

Appendix 1b

Less than Container Rates from Vancouver, British Columbia

Destination	Cubic Metre/1,000 kg	Minimum b/l
Hong Kong	US$ 95	US$ 110
Tokyo/Yokohama	US$ 135	US$ 120
Singapore	US$ 160	US$ 145
Port Kelang	US$ 210	US$ 275
Kaoshiung	US$ 155	US$ 140
Pusan	US$ 145	US$ 130

Consolidation rates include terminal charges and surcharges. Rates quoted by Overseas Container Forwarding Inc., Vancouver, British Columbia

Transit Time from Vancouver, British Columbia

Destination	Transit Time
Tokyo	11 Days
Hong Kong	19 Days
Korea	15 Days
Taiwan	13 Days
Singapore	25 Days
Malaysia	29 Days

British Columbia Government Organizations

Ministry of Economic Development, Small Business and Trade
Asia-Pacific Branch
International Division
Suite 629, 999 Canada Place
Vancouver, British Columbia
V6C 3E1
Tel: (604) 844-1800
Fax: (604) 660-3917

British Columbia Trade Development Corporation
Suite 730, 999 Canada Place
Vancouver, British Columbia
V6C 3E1
Tel: (604) 844-1900
Fax: (604) 660-2457

British Columbia Representative Offices in Hong Kong, South Korea, Japan, Singapore and Taiwan may be contacted through the Ministry of Economic Development, Small Business and Trade.

Consulates and other Foreign Government Representatives in British Columbia

China
Consulate General of the
People's Republic of China
3380 Granville Street
Vancouver, British Columbia
Tel: (604) 736-3910

Hong Kong
Hong Kong Trade Development Council
700-1550 Alberni
Vancouver, British Columbia
V6G 1A3
Tel: (604) 685-0883
Fax: (604) 669-3784

Japan
Consulate General of Japan
900-1177 West Hastings
Vancouver, British Columbia
V6E 2K9
Tel: (604) 684-5868
Fax: (604) 684-6939

Japan External Trade Organzation
660-999 Canada Place
Vancouver, British Columbia
V6C 3E1
Tel: (604) 684-4174
Fax: (604) 684-6877

Malaysia
Consulate of Malaysia
Trade Commissioner
34 King Street East
Toronto, Ontario
Tel: (416) 869-3886

Malaysian Consulate
2800-666 Burrard
Vancouver, British Columbia
V6Z 2K4
Tel: (604) 689-8899
Fax: (604) 689-8804

Singapore
Singapore Consulate
Suite 1700
1075 W. Georgia
V6E 3G2
Tel: (604) 631-4868
Fax: (604) 631 3232

South Korea
Consulate General of the Republic of Korea
1066 W. Hastings
Vancouver, British Columbia
V6E 3X1
Tel: (604) 681-9581
Fax: (604) 681-4864

Korea Trade Centre
1710-505 Burrard
Vancouver, British Columbia
V7X 1M6
Tel: (604) 683-1820
Fax: (604) 687-6249

Taiwan
Co-ordination Council for North American Affairs
Suite 2410
Westin Building
2001 6th Avenue
Seattle, Washington 98121
Tel: (206) 441-4586

Further References

Export Markets for Bottled Water: Agri-Food, Fish and Resource Products Bureau, External Affairs and International Trade, Canada, April 1990.

A profile of the domestic, U.S, Japanese and European markets for Canadian bottled water. Includes section on Canada's competitive edge and Do's and Don'ts. 16 pages.

Export Opportunities in Japan: the Food Service Market, The Japan Trade Development Division, Department of External Affairs, Canada, 1989.

A survey of the retail and commercial food industry in Japan, focusing on Western-style restaurant and fast food chains. 40 pages.

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